Using Driver Groups

Link: https://help.gpsinsight.com/docs/about-drivers/using-driver-groups/ Last Updated: January 28th, 2016

Driver groups are used to organize the drivers based on logical separations that make sense to your business. Groups allow you to easily filter reports, maps, and dashlets. Groups also as determine which users of your account can view information for certain drivers.

Add Driver Groups

You can create any number of driver groups. For each group you create, you can assign drivers and users to that group. Drivers and users can belong to more than one driver group.

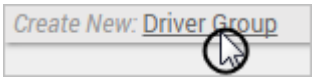
> **EXAMPLE**
> Company XYZ uses trucks to transport large heating/cooling equipment and uses vans for conducting on-site repairs. Drivers that are qualified to operate the trucks are assigned to a “Delivery” group. Drivers that specialize in service are assigned to a “Service” group. Some drivers are qualified to conduct deliveries and make on-site repairs, so they are assigned to both groups. XYZ’s owner wants his Service Manager, Tom Jones, to only see drivers that belong to the “Service” group when Tom accesses the portal.

To create a new driver group:

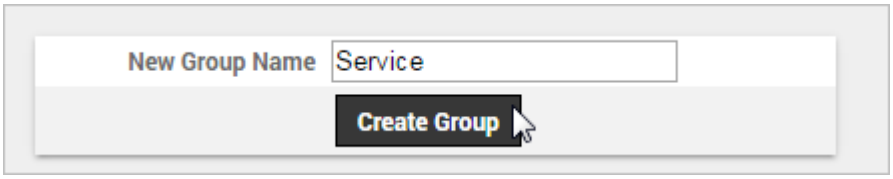
1. From the portal, hover over the **Account** menu, click **Manage Drivers**, and click **Open**.

   The Manage Drivers and Groups page opens in a new browser tab.

1. At the bottom of the Driver Group List grid, click **Driver Group** next to Create New.



1. In the Create New Driver Group window, enter a name for the group.
2. Click **Create Group**.



   The window refreshes with a list of all drivers. By default none of your drivers are included in the new group.

1. From the right pane (Drivers NOT in the group), click to select the driver(s) to add to the new group. (CTRL+click or SHIFT+click to select more than one driver at a time.)
2. Click **Add**.

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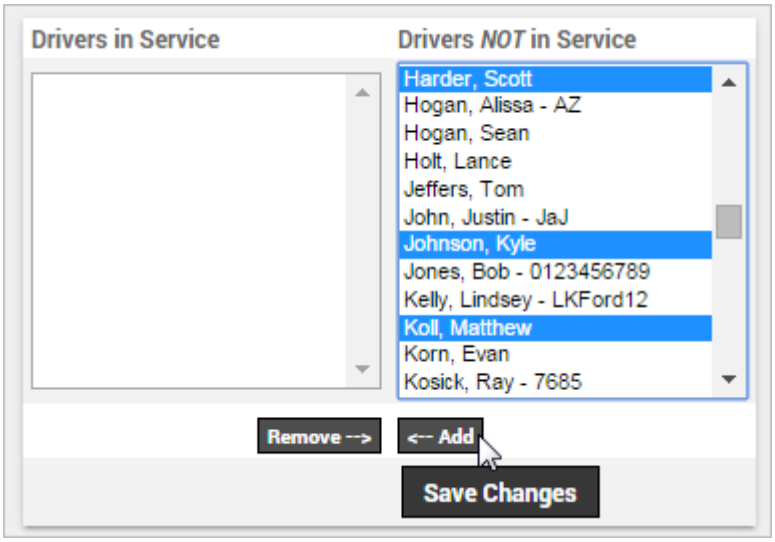
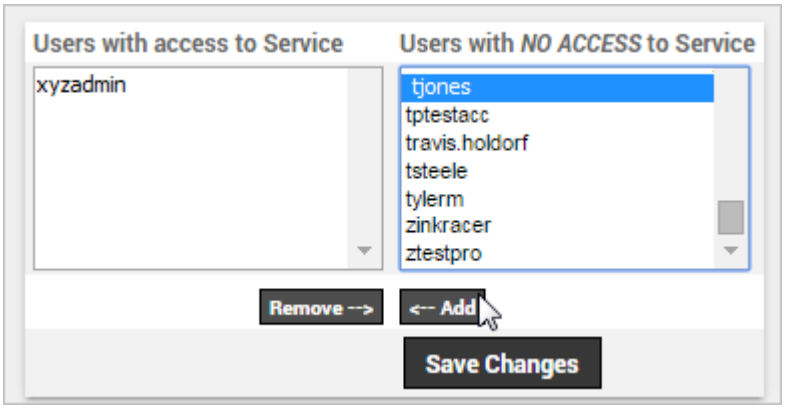


1. Click **Save Changes**.

   The window refreshes with a list of all users. By default your username is included in the group.

1. From the right pane (Users with NO ACCESS to the group), click to select the users to add to the new group. (CTRL+click or SHIFT+click to select more than one user at a time.)
2. Click **Add**.



1. Click **Save Changes** and then **Close** to return to the Manage Drivers and Groups page.

Note. If you skipped a user by mistake, or if you would like to manage user access after the initial setup, you can do so from the Users administration page.

Set Driver Group Membership

Each time you create a new group, you can assign driver(s) and user(s) to that group. If you skipped a driver by

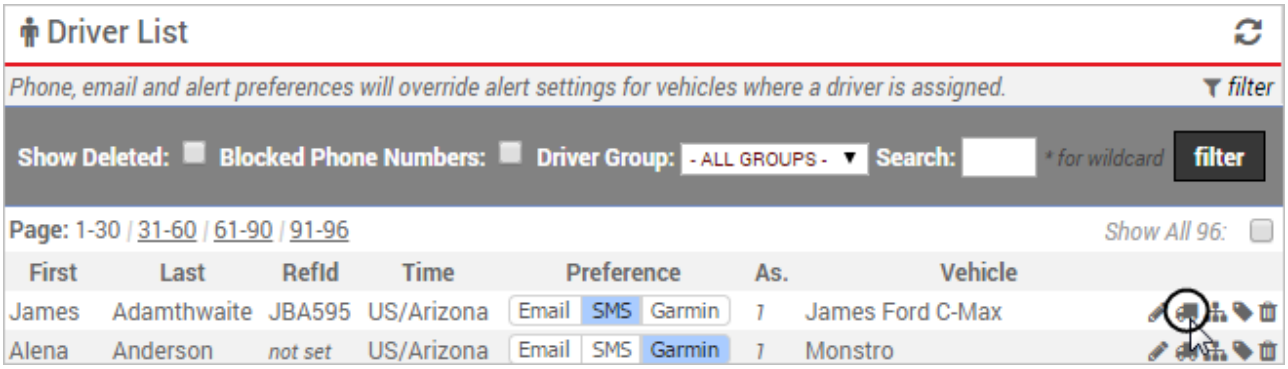
mistake during that process, or if you want to quickly update group membership for a specific driver after initial group creation, you can use this process.

To assign or remove a driver to/from one or more groups:

1. From the portal, hover over the **Account** menu, click **Manage Drivers**, and click **Open**.

   The Manage Drivers and Groups page opens in a new browser tab.

1. From the Drivers List grid, locate the driver you want to assign to one or more driver group, and click **Assign to Driver Groups** (group icon).



   The window refreshes with a list of all driver groups including those groups that are already assigned to the current driver.

1. From the right pane (Groups driver is NOT in), CTRL+click to select the driver groups you want to assign to the current driver.
2. Click **Add**. (Or select groups from the left pane and click Remove to un-assign the current driver from groups.)
3. Click **Save Changes** to return to the Manage Drivers and Groups page.

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